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ABSTRACT

Although teachers are a prime target of state reform agendas, recent research suggests that teachers are also major sources of influence on career ladders, an expensive and controversial reform. Assessment of Utah career ladder reform indicates that a 1983 Utah Reform Committee proposal aimed at differentiating salaries, creating hierarchical positions, and generating ongoing professional growth activities has produced an egalitarian distribution of benefits, minimal staff differentiation, and support for familiar work patterns. Teachers were critical actors in this controversial process. This paper examines teachers' capacity to shape career ladder policy at the state and local level, the processes through which they exert influence, and the conditions enabling them to become major determiners of reform efforts. The study gathered state-level data from official documents, newspaper files, printed materials, and 49 indepth interviews with legislative and executive staff, state education agency staff, interest group representatives, media reporters, and other observers. Local data were acquired from the career ladder plans districts submitted to the state board of education, a state office of education survey of teacher opinions, and other sources. Findings showed that despite having little impact on reform inputs, teachers were able to constrain state activism by operating through their associations and their social interactions in the workplace. By shifting decision-making focus to the local arena, they converted an unfriendly reform into one more commensurate with their own views and values. Included are 99 references. (MLH)

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SHAPING CAREER LADDER REFORM
THE INFLUENCE OF TEACHERS ON THE POLICYMAKING PROCESS

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INTRODUCTION

The "unprecedented outpouring" of teacher-focused statutes, regulations, and recommendations indicates that teachers have become a salient topic and a central target of the current education reform movement (D. Mitchell, 1986:1). Numerous national commissions, task forces, and state legislatures have made teachers a primary subject of their reform agendas and a primary object of their reform interventions (Carnegie Forum on Education and the Economy, 1986; Holmes Group, 1986; National Commission on Excellence in Education, 1983; National Governors' Association, 1986).

While teachers are clearly the targets of influence, our research suggests that on one of the most prominent, expensive, and controversial reforms, career ladders (Olson, 1986:1), teachers are also major sources of influence. Assessments of the career ladder reform in Utah indicate that with rare exception, a proposal aimed at differentiating salaries, creating hierarchical positions, and generating opportunities for ongoing professional growth and career advancement (Utah Education Reform Committee, 1983) has produced an egalitarian distribution of benefits, minimal staff differentiation, and support for familiar work patterns (Malen and Hart, 1987; Malen, et. al: forthcoming). Although a variety of factors converged to produce these outcomes, teachers were critical actors in the conversion process. Thus, this paper examines the capacity of teachers to shape career ladder policy at the state and local level, the processes through which they exert influence, and the conditions which have enabled them to become major determiners of reform effects. Our primary purpose is to describe and characterize the teachers' role. We offer preliminary, tentative interpretations of those dynamics, recognizing that more complete explanations require the application and integration of related literature beyond that considered here.[1] Attempts to more fully account for the influence patterns described in this paper will be addressed in subsequent writings.

Utah was chosen for study for several reasons. First, the career ladder policy in this state is a fairly discrete reform. Enacted as the state's "flagship" education initiative and established as a categorical program, the policy is more amenable to mapping than omnibus reform packages. While education policies do interact (Mitchell and Encarnation, 1985), the categorical nature of programs makes the task of tracing activities spawned by the policy and the challenge of untangling the processes shaping the policy somewhat more manageable (Kirst, 1986). Second, all districts have participated in this optional program since 1984. The early, extensive, and uninterrupted involvement with the career ladder reform provides a favorable laboratory for charting the role teachers play in shaping this policy.

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[1] As Van Meter and Van Horn point out, "It is one thing to examine the determinants of policy decisions and to identify their impacts or consequences-it is another to provide explanations for those observed consequences" (1975:477). Yet, a systematic attempt to map the adoption and implementation dynamics over several years is an essential, albeit initial step in developing " a reasonable web of causal influences that helps us understand" not only what happened, but why it happened that way (Huberman and Miles, 1984:1).

Conceptual Framework

The framework that guides our analysis combines a systems orientation with power categories. Policymaking is viewed as a set of continuous, dynamic interactions through which inputs, including demands for change are converted into outputs, including formal decisions and patterned activities (Easton, 1965). Institutions are seen as arenas in which interdependent actors promote and protect diverse and conflicting interests through an influence process based on power and characterized by bargains, exchanges, compromises, and accommodations[2]. The resultant accommodations reflect the relative power of policy actors not the relative merits of the policy adjustments. The focus then, is not on the desirability of the outcomes, but on the processes which produced them.

A rich body of literature points to the strength of this perspective for studies aimed at analyzing the adoption and implementation of innovations (Bailey and Mosher, 1965; Bardack, 1978; Berman and McLaughlin, 1978; Nakamura and Smallwood, 1983:21-84). During the adoption stage actors articulate, avert, alter, and aggregate proposals in order to accommodate competing priorities, diverse interests, and contextual conditions. The "bargaining and maneuvering, the pulling and hauling of the adoption process carries over into the implementation phase" as various participants interpret goals, mold directives, and develop responses to new ventures (Bardack, 1978, p. 38). Since actors within and across arenas bring their preferences and predispositions, their perceptions of situations and circumstances to bear on adoption and implementation decisions, innovative policies are constantly being formed and shaped, defined and redefined at all levels of the system (Bardack, 1978; Berman and McLaughlin, 1978; Ferrar, et. al., 1983; Lipsky, 1980; Nakamura and Smallwood, 1980). Policy is, as McLaughlin observes, constantly "in flux ... It is created and recreated at various levels within the organization in ways that are consistent with the interests, goals, and perceptions of the various individuals involved" (McLaughlin, 1984:8).

The influence of teachers, like that of any other actor, is contingent on their command of relevant resources, the skill and will with which they deploy those resources, and "other players perceptions of the first two ingredients" (Allison, 1971:168). Teacher influence can be inferred by examining their goals, resources, and strategies, what Gamson (1968) refers to as capabilities and attempts to achieve decision benefits; by gauging their ability to initiate or constrain, promote or prevent action in different arenas during different stages of the policymaking process (Kingdon, 1984); and by assessing the extent to which policy outcomes reflect their preferences and priorities. The influence of teachers, like that of any other actor, is conditioned by institutional arrangements (e.g. norms, traditions, and action channels), and environmental forces (Mazzoni, 1986).

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[2]Many scholars have described this perspective in greater detail. See, for example, Allison, 1971 and Mazzoni, 1986.

Data Sources and Methods

This paper is based on state, district, and site level data gathered by the authors, university colleagues, and state education agency officials as part of an ongoing effort to describe career ladder enactment and implementation in Utah.

State level data were acquired from official documents, newspaper files, printed materials, and forty-nine indepth interviews with legislators, legislative staff, executive staff, state education agency personnel, interest group representatives, media reporters, and other proximate observers. Interviews focused on the legislative process through which the career ladder policy was initially adopted and subsequently revised. The data collection and analysis procedures, along with a detailed explication of findings, are reported in case studies of career ladder policymaking in the 1984, 1985, and 1986 legislative sessions (Malen and Campbell, 1985; Malen and Murphy, 1985; Malen, 1986). These case studies provide the basis for analyzing the role of teachers in shaping the career ladder reform in state arenas.

Local level data were acquired from the career ladder plans districts submitted to the state board of education, a state office of education content analysis of these plans (Utah State Office of Education, 1985) a state office of education survey of teacher opinions regarding career ladder operations (Nelson, 1986) and fourteen indepth investigations of career ladder implementation in ten districts. Six of these studies were conducted in 1984 (Career Ladder Research Group, 1984). The remainder were conducted in 1985 and 1986 (Hart, 1986; Hart, Kauchak and Stevens, 1986; Kauchak and Peterson, 1986; Murphy, 1986; Hart and Murphy, 1986). The 1984 studies relied on intermittent observations of committee meetings and indepth interviews with career ladder committee members, superintendents, principals, parents, and teachers. The 1985 studies combined intensive interviews with surveys of principals and teachers in twenty-seven schools. The 1986 studies focused on five schools and acquired data through participant observations, a series of structured interviews with teachers and administrators and informal meetings with career ladder committee members.

In sum, the data base for analyzing local implementation consists of over five hundred formal interviews with teachers, administrators and other career ladder planning committee members, augmented by numerous informal conversations, observations, documents, and printed materials. Full accounts of methods and findings are contained in the reports cited. To fill gaps in information, probe the plausibility of emergent themes, and test the strength of rival interpretations, thirty-seven additional informal interviews with administrators and teachers were conducted during February and March, 1987.

Although data were gathered by several researchers using multiple sites, sources, and methods, there are limitations. Recognized as fruitful approaches to research on new policies and complex processes, case studies are highly susceptible to investigator bias. A post factum analysis carried out by those who conducted much of the original research can compound that problem. Further, the words of those within the organization, "even those knowledgeable and well placed are not inevitably reliable in terms of

portraying the extent to which a political process is operating" (Pfeffer, 1981: 238). Organizational members are prone to interpret and legitimate decisions from a rational, objective perspective; most are reluctant to admit or explicate their power. Individuals often see themselves as "hemmed in" by forces within the organization, and by requirements imposed by the environment (Morgan, 1986: 180-81). Even though political behavior is a natural response to the tensions precipitated when views and values collide, when professionals and publics consider change, when, in short, stakeholders cluster around issues and events of import, the tendency to recount and reframe interactions in more normative terms is still present. While interview transcripts are replete with illustrations of adjustments made to accommodate varied interests, avoid conflict and fashion consensus, the sensitive nature and, at times, subtle character of political processes complicate data collection and analysis. In an attempt to address the limitations embedded in the subjectivity of the research method and the sensitivity and subtlety of political interactions, several established procedures to enhance accuracy were incorporated: open-ended interview guides, team analysis of data, a systematic search for exceptions to prominent themes, and collegial and informant reviews of interpretations (Lofland, 1971; Patton, 1980; Murphy, 1980).

THE CAPACITY TO CONSTRAIN STATE ENACTMENT DECISIONS

Teachers typically exert influence on state level policymaking through their associations. Though scholars concede that increased state activism and self-interest criticism have diminished the power of teachers, these associations are still characterized as "more influential than any other groups in the educational arena and often as influential as any of the interest groups in the state (Rosenthal and Fuhrman, 1981:61), as the "second most influential cluster of policy actors (second only to individual members of the legislature) at the state level" (Marshall, 1986). Assessments of educator influence on the recent reform movement, however, suggest that the traditional education interest groups "constituted a weak opposition." (McDonnel and Fuhrman, 1985:53). They were unable to execute one of the strongest interest group strategies, that of keeping contentious proposals off the agenda (Sroufe, 1981:154; Bachrach and Baratz, 1963). In many states, teacher associations had to accept unpopular policy directives in exchange for increased financial appropriations (McDonnell and Fuhrman, 1981:54; Cuban, 1984; Odden, 1986).

While that assessment is generally consistent with the reform dynamics in Utah (Malen and Campbell, 1985), it understates the significance of battles won by the teachers association during the adoption phase and it understates the impact of adjustments made by the "street level bureaucrat" (Lipsky, 1980) in the implementation phase. The Utah Legislature enacted a career ladder policy despite teacher opposition. But "defeat does not necessarily imply lack of influence" (Gamson, 1968:72). On the career ladder issue, the Utah Education Association (UEA) was able to secure important concessions at the state level. Policy goals were diffused; rules were relaxed; local district latitude was protected; and formal access to more favorable decision arenas (district career ladder planning committees) was secured. These accommodations created the conditions that enabled teachers to become major

architects of career ladder plans and major determiners of reform effects at the local level. As Lipsky writes, multiple objectives, local autonomy, and involvement in attempts to change ongoing practices are conditions "that lead people at the bottom rather than the top to make policy although they do not have formal authority in organizations" (Lipsky, 1978:399). Moreover, the UEA has been instrumental in preserving those consequential concessions in subsequent reviews of the state statute and subsequent revisions of state regulations, thereby sustaining a favorable opportunity structure for teacher influence in implementation.

In a state characterized by a strong tradition of local discretion and a strong commitment to consensual norms (Campbell, 1981), on a reform perceived as dependent on teacher cooperation for its success, at a time when revenue shortages restricted the range of viable options, teachers wielded policy influence largely through their capacity to constrain state activism. Like teacher associations in other states, the UEA commands "substantial resources" (Rosenthal and Fuhrman, 1981:61; Aufderheide, 1976). Nearly all of the state's 16,000 teachers are affiliated with this organization. Besides a relatively large membership, the UEA has an impressive campaign warchest (approximately $150,000), an established communications network with local units, forty-five full-time staff housed at state headquarters and regional offices, experienced lobbyists, a reputation for being able to affect elections, to post a "high hit-rate" in select districts, and a reputation for being able to block legislation, "beat back" bills, even "stop them when they put their mind to it." The process through which teachers mobilized these resources to constrain state activism is illustrated through an analysis of conflicting priorities, influence strategies, and decision outcomes.

Conflicting Priorities

In 1983, when the national excellence movement permeated the Utah context, teachers responded by framing the school quality problem as a matter of inadequate working conditions and by defining the solution as a matter of uniform salary increases, meaningful class size reductions, relief from non-teaching tasks, adequate instructional supplies and updated instructional materials. Others, notably the governor, defined the issue differently. School quality was portrayed as a function of teacher competence and commitment. The solution rested on the creation of differentiated reward structures, the infusion of stronger accountability mechanisms, ie, performance-pay plans, as well as continued investment in teacher salaries, support services, and instructional supplies.

Influence Strategies

In 1983, the UEA's primary influence strategy was, in the words of a UEA spokesperson, "to set itself up as an obstacle." The governor had preempted other options. The Office of Governor is a powerful one in Utah (Gray, Jacob and Vines, 1983), and when these positional assets are augmented by personal resources, the individual who occupies the office can be a potent actor, particularly in the early stages of the policymaking process, when issues are selected for attention and items are elevated to agenda status (Hines, 1976). While no single force defines an issue and pushes it to prominence on the

governmental agenda, executive officials can be extremely influential, particularly when they function as policy entrepreneurs, when they assume responsibility "not only for prompting important people to pay attention, but also for coupling solutions to problems and for coupling both problems and solutions to politics" (Kingdon, 1984:21). In 1983, Governor Scott Matheson operated as an astute policy entrepreneur.

In cooperation with legislative leaders, Matheson appointed the Education Reform Steering Committee (ERSC) to garner support for two goals: major increases in education expenditures and major changes in teacher compensation structures. Reflecting the governor's charge, the ERSC developed, as its lead recommendation, a state-wide, centralized career ladder plan for teachers and tied sizeable revenue increases to this reform initiative. The ERSC had formidable resources -- stature, expertise, money to finance polls and publications, a forum from which to speak, access to executive and legislative staff, cooperative relationships with concurrent task forces, linkages with elected officials, the Mormon Church, and the business community. In concert with the governor, the ERSC promoted this plan through highly visible activities -- open hearings, press conferences, polished publications, town meetings, television advertisements -- and through low profile exchanges, "a lot of preliminary, private politicking" with representatives of the business community, the Mormon Church, key legislators, and public education interest groups. The salient symbols of excellence and action, the private enterprise rubric of economic incentives for greater productivity and economic rewards for exceptional performance could both activate publics and legitimate claims, particularly in a state whose comparatively high tax effort for education is diluted by constantly growing school enrollments and in a legislature that has a strong history of adherence to fiscally conservative principles and a strong delegation of business-oriented members. Through the familiar task force strategy (Hines, 1976; Odden, 1986), the governor not only linked an available solution to a pressing problem, but coupled political power to contextual opportunity.

While the governor's early entry and entrepreneurial skill in deploying resources to set the state's education reform agenda placed the UEA in a defensive posture, within the confines of this defensive position, the UEA wielded influence. Despite a division of opinion among members of the association on the propriety of political action and the propriety of career ladder legislation, despite the distraction of transitions in organizational leadership, the UEA mounted strenuous resistance. The UEA was not only sufficiently equipped, it was highly motivated. A state-wide career ladder program cut to the core of teacher union interests. Such a plan diverted funds from the associations' primary goals, across-the-board salary increases and improved working conditions, and threatened the single salary schedule, the association's major means of protecting its members from economically arbitrary or capricious treatment. The UEA suspected that the career ladder proposal was "a cover" for merit pay, an overture that often ignites prompt

and potent resistance from teacher organizations.[3] Moreover, the governor's decision to deny the UEA a seat on the ERSC angered the UEA. Both the substance of the proposal and the exclusion from the process triggered spirited opposition. Though the UEA did not have optimum political discipline it became a potent political presence. The UEA mobilized to disrupt presession promotional activities, delay in-session negotiations, and thereby move from the periphery to the center of the education reform coalition.

Disruption of Pre-Session Promotion Activities

The UEA contacted local chapters, encouraged members to "stack" the ERSC-sponsored meetings, emphasize the governor's "unfair" decision to "exclude" teachers from membership on the ERSC, reiterate "the lack of clear evidence on the effectiveness of career ladders" and capitalize on the media attention that controversial town meetings can stimulate. In addition, the UEA surveyed teachers, conducted its own public opinion polls, informed members of UEA priorities through local school meetings and film presentations, and directed members to visit, write, or phone their legislators. Although the UEA entered the arena late, after the ERSC had formulated its recommendations, this actor managed to "monopolize" the town meetings, create doubt and dissent among citizens and lawmakers, tarnish the efficacy of the proposed cure, and dramatize the division within the public education lobby. The UEA shook the norms of a consensually oriented culture and threatened the likelihood that any reform legislation would be passed. By the time the legislature convened, the UEA had established itself as a force to be accommodated. Members of the ERSC and their backers realized that they had to "quiet and appease" the UEA, "bring them along" if they hoped to have the leverage required to move the democratic governor's package through a Republican dominated legislature. While it is easy for observers to confuse "high visibility with political muscle" (Peterson and Rabe, 1983:708; Pfeffer, 1981:44-50) in this case, policy actors were cognizant of UEA power.

Delay of In-Session Negotiations

When the legislature convened, the UEA moved from high visibility disruption to low visibility delay; what informants termed a "stretch-it-out and water-it down ploy." The UEA lobbied and testified on behalf of its own priorities and engaged in informal career ladder conversations with members of the ERSC, other education interest groups, and legislators. But the UEA was unwilling to "strike the deals" and "settle on specifics" until the closing days of the session. The association had set itself up as a relevant policy actor but a reticent policy broker.

To be sure, the UEA knew it had to negotiate. Like other education groups, this organization did not want to let "the best opportunity in years" slip away. Since Utah schools are comparatively under-funded and

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[3]For an analysis of teacher union resistance to merit pay overtures in other states, notably Tennessee and Florida, see Handler, 1984; Handler 1985; and Alexander, 1985. The reasons for such resistance are discussed by many. See for example, Lieberman, 1985.

demographically over-burdened,[4] the prospect of a significant increase in education appropriations constituted a strong incentive for the UEA to "come on board." As UEA spokespersons put it,

> In this state you've got to get money when you can and how you can and as much as you can. All of us had to accept career ladders and try to form them ... it was the only way to get money to teachers.

Others confirmed that assessment. The career ladder proposal was commonly called "the only game in town," "the only pump to prime."

Moreover, there was a need to avert more stringent legislative mandates. Small groups of "peripheral but vocal" legislators, backed privately by individual superintendents and publicly by members of the state board of education, were introducing "diversionary bills worse than career ladders [e.g, compulsory, comprehensive merit pay bills] ... When we saw those we knew we had to negotiate." The UEA would get behind the career ladder bill because it was one of the few alternatives available and because it was more malleable, and therefore more palatable than merit pay.

But, the UEA also knew that the ERSC had to negotiate. Bargaining can be "touched off by high interest issues" (Mitchell, 1981:58), and education reform was clearly a high interest item for the ERSC as well as the UEA. As the session progressed, it became increasingly apparent that the ERSC needed the clout of a unified public school lobby to counter a contentious and conservative Republican Caucus, reluctant to both raise tax rates and "rubber stamp the governor's package." While financial stakes, diversionary bills, and a climate that clamored for action required that the UEA and ERSC negotiate, in a twenty day budget session, the UEA was bent on maximizing its bargaining position by "ducking, dodging and delaying agreements" as long as possible. Amidst "reminders" that failure to "buy in" to the career ladder policy would cost public education sizeable amounts of money, "warnings" that "the blame would be placed squarely on their [UEA] shoulders," counterbills "more troublesome than the career ladder," the UEA "dragged its feet," and "held out until the last possible moment."

Move from the Periphery to the Center of the Education Reform Coalition

The UEA's ability and willingness to resist through disruption and delay, merged with legislative recognition that "without teacher backing career ladders wouldn't work even if we got them through," to intensify the importance of a UEA alignment. Legislators consistently stated: "without teacher cooperation nothing good would happen." Since both the passage of the bill and the potential effectiveness of the program required UEA support, this actor moved from the margin to the middle of the bargaining process. The UEA was invited to the private negotiations, marathon meetings, and drafting sessions and, the UEA was accommodated in those exchanges.

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[4]Utah's pupil teacher ratio is the highest in the country; per pupil expenditures for K-12 education are the lowest in the country.

Decision Outcomes

The UEA was able to shift decision arenas, acquire legitimate access to those arenas, and attach their interests to the new legislation. While each of the concessions made to "bring the UEA along" is important, the cumulative effect is even more impressive because the conditions which could enable teachers to exert substantial influence on the career ladder reform during the implementation phase of policymaking were set in place.

Shift in Arenas

Aided by a strong tradition of local discretion and articulate superintendents (individuals who were committed to the principle of local autonomy, eager to acquire a semblance of teacher support and retain some control at the district level), the UEA secured a commitment to locally-developed versus state-mandated career ladder plans. The original state-wide centralized model was set forth as one example of what districts could do, not the example of what districts must do. Because this adjustment created opportunity for continuous alteration of the initial proposal and invited deviation from the single state model, it could directly affect power relationships and policy emphasis.

Astute political players recognize that decision arenas are never neutral. Arenas do not simply "locate action. They establish the relevant authorities, rules of the game, points of access, appropriate resources and ... style of bargaining. Shifting the arena can transform decisionmaking, its 'mobilization of bias,' and hence its winners and losers" (Mazzoni, 1986:6; Schattsneider, 1960). The UEA believed that a change in decision points, a shift from state to local arenas could enable them to "reformulate the reform," particularly if they could also secure legitimate access to local district planning committees.

Legitimate Access

While access can be acquired in a variety of ways, formal recognition is the most direct route. Thus, the UEA worked to ensure that teachers would be represented on local district career ladder planning committees. Since the UEA had dramatized their "exclusion" from the ERSC, their inclusion on district committees "came easily." While plans were subject to state education agency approval, they were to be defined by teachers, administrators and parents at the local level.

This "natural compromise" was an important win. Access to decision points is essential to influence. As Truman wrote decades ago, "Power of any kind cannot be reached by a political interest group, or its leaders, without access to one or more key points of decision in the government. Access therefore, becomes the facilitating intermediate objective of political interest groups ... The development and improvement of such access is a common denominator of the tactics of all of them ... the common feature of all of their efforts is the attempt to achieve effective access to points of decision (150:264). By securing a legitimate seat on the local district career ladder planning committees, the UEA accomplished that objective. Even though the

opportunity to participate in the design of a policy carries with it some responsibility to own and defend that policy (Morgan, 1986:146), teachers had won the right to be seated with the architects of the career ladder reform.

Attachment of UEA Priorities to Career Ladder Legislation

The UEA insisted on three major content compromises. First, the extended contract option had to be expanded. The UEA argued that a minimum of fifty percent of career ladder appropriations should be used to support this component. Consistent with the UEA's primary priority - increased salaries for all teachers, the emphasis given extended contracts was viewed as the "enabling provision." All informants concurred: "Without it, we couldn't have brought them along." Second, teacher evaluation protections had to be inserted. The statute would include a clause requiring districts to develop "fair, consistent, and valid" teacher evaluation systems. Both the ambitious and elusive character of this requirement gave the UEA a "handle" for securing the third content adjustment, an ambiguous reference rather than a specific commitment to performance bonuses or merit pay stipends and the insertion of language permitting multiple, open-ended routes to promotion on the career ladder.

A typical and critical interest group activity is "attaching one's own alternatives to agenda items that others have made prominent ... even if they haven't started the ball rolling, once it is rolling they try to insure that interests are protected in the legislation that emerges" (Kingdon, 1984:53). By insisting that their priorities and protections be included, the UEA attached its central interests to the career ladder legislation. This actor linked its preferences to the general rubric and molded the specific rules of the career ladder reform. In so doing, the UEA converted the initial ERSC proposal to an eclectic policy.

The career ladder statute combined UEA priorities and ERSC initiatives. It also contained a modest recognition of the merit pay faction. Half the funds could be used for the extended contract provision, a clause permitting uniform salary increases to all teachers based on the existing salary schedule. Half the funds must be used for performance based promotions, but the avenues for promotion were loosely defined. The statute made reference to but provided little specification for a performance bonus or merit pay requirement based on assessments of classroom teaching. The statute also included a job enlargement option that permitted teachers to earn additional money by taking on special projects and a staff differentiation option that permitted teachers to earn additional money by assuming new positions.

As is often the case, competing actors forged an instrumental alignment, not a conceptual agreement (Lindbloom, 1968; Mitchell, 1981; Kingdon, 1984). They recognized the realities of the legislative process. Precise settlements of conflicting interests are rarely attainable; frequently, "only by leaving some matters somewhat nebulous and unsettled can agreement on legislation be reached" (Anderson, 1975:100). The product of the enactment process is typically a policy that combines diverse priorities in ambiguous ways and delegates to subsystem agencies, the task of making more definitive judgments regarding the ultimate resolution of competing views. Under these conditions,

implementation becomes an extension of the legislative process as participants interpret, adjust, and convert general policy directives into concrete action plans. The UEA's capacity to shift arenas, legitimate access, and attach teacher priorities to the career ladder legislation during adoptions meant that the association had created a favorable opportunity structure through which teachers could wield even greater influence during implementation.

Preservation of Concessions

Although there have been attempts to tighten career ladder requirements and strengthen merit pay stipulations, these moves have been arrested. A key factor in the containment of state regulation is the power of the UEA. In concert with individuals from the Society of Superintendents, the UEA contains merit pay moves in the legislature, with salient appeals -- reminders of "the promise" to let local districts plan and refine their programs, appeals that tap a "genuine, almost sacred value" -- and power resources. As legislators put it, there is "a real reluctance to push too much merit ... we'd really hear it from the UEA and the Society." In a setting that clings to consensus norms, legislators do not wish "to open a can of worms ... awaken sleeping giants ... create an explosive situation ... put a match to the fires of the Superintendents and the UEA." Even those legislators who criticize UEA tactics and label the organization a "negative force" that "alienates" lawmakers concede:

> On this issue, how the UEA will react is in the back of your mind and it limits what you can realistically afford to do ... They can create real problems if they get so angry they walk out or cut back on work.
>
> You don't want to ignite them ... rile them up ... provoke them into more overt action ... It's hard to take them on ... The UEA can harass and wear you down and you can't fight all the time so you give in.
>
> The UEA can make life miserable. You have to deal.

The legislature did make a minor adjustment in the merit pay component in 1985 (ten percent of state career ladder funds were to be distributed on the basis of classroom teaching performance). The change was viewed as "a token" to quiet the merit pay faction in the Republican Caucus, a "small price to pay" to restore good will and ensure a doubled career ladder appropriation (Malen, 1986). In 1986, a more ambitious merit pay bill was "torpedoed by the UEA and the superintendents" in the education committee and blocked in conference committee by chamber leaders who did not wish to take on a contentious issue amidst stark revenue shortfalls. As one summarized:

> Making the merit change in 1986 would have been the icing on the cake ... Groups were upset, especially the UEA, about school funding levels ... You can't mess with it under those conditions.

Amidst frenetic efforts to balance the state budget and "intense interest group lobbying from the UEA and some superintendents," there was no compelling reason to raise another "hot issue" and considerable reason to "set it aside." Career ladder rules were not changed; career ladder appropriations were

increased by $5 million rather than the anticipated $10 million. But when other service sectors were being cut back, both friend and foe of the career ladder reform interpreted the 1986 action as "a real victory" for the public education lobby and "a sizeable win" for teachers.

The state education agency has recommended an expansion of the merit pay component (from ten to twenty-five percent of state funds), but again, formal action has been restrained by the perception that such a change would, in the words of state education agency officials, "invite the UEA to blow the whole thing up in our faces" and "put us in a real turf fight with the superintendents." Both situations are to be avoided. As one state board member expressed it "You can't buck them when you have to work with them." Another added, "in this state there needs to be a sense of partnership ... mandates and orders just don't work very well." Thus the state education agency has tended to confine its printed rules to a reiteration rather than an alteration of statutory requirements, root oversight in relatively unobtrusive, process-oriented accountability provisions, approve, with minor modifications, all district plans, and allocate all the categorical funds.

Assessment of Teacher Influence on State Level Decisions

While the analysis of goals, resources, strategies, and decision outcomes indicates that teachers have had substantial and sustained impact on career ladder policy decisions at the state level, their influence must not be overstated. Two limitations warrant discussion.

First, teachers exerted influence within the parameters set by state officials. The association's initiatives -- across the board salary increases and improved working conditions could not compete with the governor's program. These demands lacked the flair and fervor, the novelty and credibility needed to capture the attention of either state officials or broad publics. With "the public, the press, and business and political elites across the country urging swift and sweeping action," (Odden, 1986:4) like state officials elsewhere, state officials in Utah wanted to "do something dramatic." UEA demands, characterized as the "same old song," were not compelling in a setting characterized by reawakened public interest in and caustic public criticism of K-12 schools.

Moreover, the association's resources were no match for the positional assets of an activist governor, who skillfully deployed those resources in an early, extensive and determined effort to set the state's education agenda. The legal authority to articulate the agenda in state of the state addresses and budget presentations, the prerogative of establishing task forces, and the capacity to command media attention give chief executives a decided advantage at this stage (Kingdon, 1984). Without formal representation on the governor's task force or dependable linkages with ERSC members, the UEA was severely restricted in its ability to influence the agenda. Since elected officials are the ultimate guardians of the governmental agenda (Cobb and Elder, 1983:179) interest group options are often confined "to what the executive and legislative branches are prepared to consider," not to what interest groups are inclined to propose (Peterson and Rabe, 1983: 709).

Lacking the power to set its own initiatives, its own definition of the problem and solution on the center of the state's agenda, the UEA was placed at a distinct but not debilitating disadvantage. As Kingdon cautions, setting the agenda is not "the same as getting one's way" (1984:24). The structures and processes of government afford numerous opportunities for actors to "have a wallop at influencing policy" (Sroufe, 1081:162). Even though the UEA could not control the state agenda, this organization could become a potent policy actor, exerting substantial influence on the rules and regulations, the form and content of the statute. While such influence might appear peripheral, "far from being the unfinished details of legislation, regulatory decisions frequently are critical policy determinations" (Berry, 1984:37).

Second, teacher influence was enhanced by articulate and able superintendents who sided with the UEA on several critical issues. Superintendents, particularly those from the larger districts, are "relied on ... listened to." Their expertise, status, visibility, common religious affiliations and years of lobbying experience constitute potent resources. While the Society of Superintendents endorsed the initial ERSC proposal, respected individuals sided with the UEA on arena, access and content considerations. Their support certainly strengthened the UEA's bargaining position and enabled the association to secure and sustain major compromises. Contextual forces also augmented teacher influence. While the revenue-reform link was unmistakably clear and state activism was especially pronounced, Utah's strong tradition of local discretion and strong commitment to consensual norms meant that authorities were receptive to the process issues emphasized by the UEA. Even though lawmakers were angered by UEA tactics, many were sympathetic to their call for local district development of career ladder plans and to their desire for representation on the district committees. In Utah, local capability-building strategies are culturally congruent as well as politically useful; collaborative decisionmaking arrangements are frequently used to avert or alleviate conflict; government response to discontent is often managed by modification of content rather than intensification of control (Gamson, 1968). In this context, UEA process concerns could be compelling and UEA compromise proposals could be convincing.

While teachers operated within the boundaries set by state officials, enjoyed the support of powerful allies, and the pull of political traditions, their influence was still pronounced. Teacher resistance operated to constrain legislative decisions and education agency directives. Largely through their capacity to disrupt and delay the adoption process, the UEA reminded competing actors that they were highly dependent on teachers for both the passage of the reform and the ultimate success of the program. Since the UEA's power threatened the ability of state officials to accomplish their immediate and long-range objectives, they had to accommodate the UEA in enactment and they continue to anticipate UEA responses and adjust to UEA persuasion and pressure in their subsequent reviews of career ladder legislation.

THE CAPACITY TO CONSTRAIN LOCAL IMPLEMENTATION

Even though the legislature enacted a career ladder statute, the fundamental conflict between teacher preferences (uniform salary increases,

improved working conditions) and legislative objectives (differentiated reward structures, performance-based pay systems) had not been resolved. Teachers and policymakers still held very different views of the problems to be addressed and the solutions to be applied. The "bargaining and maneuvering, the pulling and hauling of the adoption process" (Bardack, 1978:38) would carry over into the implementation phase.

During implementation, teachers yielded substantial influence largely through their capacity to constrain the installation of differentiated salary structures and new work arrangements. Although the intricate nature and complex character of implementation dynamics varied across each locale, two prominent patterns envelop the dominant features of these processes. Teachers have been able to (1) essentially translate the career ladder reform into conventional activity in most districts, and (2) significantly adapt, through incremental adjustments, the innovative elements of that reform in other districts.

Since local arenas are subsystem units comprised of relatively small groups of regularly interacting and reasonably well acquainted participants, teachers exerted influence through their social interactions and interpersonal exchanges as well as through their formal associations. Teachers entered district arenas with legal recognition of their right to participate in the design of career ladder programs and extensive latitude in the requirements of those programs. They also brought other highly relevant resources, notably the legal power to file grievances, professional expertise, their position as the primary service deliverers in school systems, and a shared ideology.

While teachers are not a monolithic group, they are deeply committed to autonomy, equality, and civility in the workplace (Lortie, 1965, 1975, 1985; Bird and Little, 1986; Malen, et.al., forthcoming). They believe policies and practices that compromise these principles infringe on the "private domain " (Lortie, 164:274) of teachers, constitute unfair treatment, and jeopardize camaraderie. Most agree that existing classroom responsibilities and related duties impose intense demands on teachers; that many presently "volunteer" their services, invest personal resources, and already dedicate considerable time and energy to their work. Most recognize that given the stressful work conditions and the unpredictability of the teaching-learning process, even the most talented and dedicated professionals face failure (McLaughlin, 1986:422). There is, then, a "pervasive feeling of vulnerability" (Lieberman and Miller, 1984:13), a tendency to "shy away from situations where conclusions about a lack of professional adequacy may either be publicly or privately drawn" (Rosenholtz, forthcoming:32). Like other human beings, teachers act to shield themselves from threatening forces; they "circle their wagons and attempt to protect themselves" from attacks on the worth of their work and efforts to set some teachers apart from other teachers (Lazerson, et. al., 1985:105). The shared beliefs, common experiences, and similar orientations meant that while individuals might disagree on specific issues, as a group, teachers would pursue similar priorities.

Even though many teachers viewed the career ladder reform as "a fad" that would fade, teachers were still "anxious," "apprehensive," "worried' about the form, content, and consequences of this new legislation. Teachers often

referred to the career ladder policy as "a ploy" to avoid paying all teachers a "decent" salary; a "gimmick to pacify teachers;" a way "to placate teachers for not giving them money across the board;" a vehicle for minimizing "the real issues ... class size, books, materials, liveable salaries; " a maneuver to "install merit pay." From the teachers vantage point, the career ladder policy was suspect. It did not directly address their immediate concerns, threatened the cherished autonomy-equality-civility norms and intensified vulnerability. Given these perceptions, teachers were willing to "get involved" in the planning process, to "reformulate the reform."

The process through which teachers shaped the career ladder reform during implementation is described in an analysis of the dominant patterns: translation to conventional activity and incremental installation of innovative arrangements. Since implementation embraces both "one-time efforts to transform decisions into operational terms as well as continuing efforts to achieve the large and small changes mandated by policy decisions" (Van Meter and Van Horn, 1975: 447), we examine both the initial planning dynamics and subsequent attempts to modify career ladder programs.

Translation to Conventional Activity

Initial Planning Dynamics

In most districts, career ladder plans were developed in less than two months. Within this time frame, districts had to organize committees composed of administrators, teachers, and parents; draft plans; and secure approval from the local board of education. Teachers attempted to influence the plans in a variety of ways.

Teacher Influence Strategies. At the outset, teachers sought strong representation on the district career ladder committees. Local associations worked to get a relatively large number of teachers on planning committees and associations worked to recruit capable individuals for those positions. In one-quarter of the districts, teachers acquired a voting majority on these committees. When districts limited committee size to a set number of teacher, administrator, and parent positions, teachers tended to augment their formal representation through broad-based teacher subcommittees that prepared materials and formulated recommendations. Where districts delegated the authority to develop career ladder plans to the school site, teachers joined those groups as well. Though informants acknowledged that some teacher representatives were "weak ... not the kinds of people that really stand up on an issue but would say ok to almost anything," most were characterized as "able," "industrious" and experienced individuals with close connections to their associations and "genuine willingness" to "invest tons of hours" in both preparation for and attendance at career ladder planning meetings.

Once district and, in some settings, site committees were established, teachers sought to define decision premises and distribution of benefits criteria. Through informal interactions between teachers and administrators as well as at formal meetings, teachers reiterated that career ladder plans must be fair, meaning that all teachers should have an "even chance" to secure career ladder benefits. Teachers contended that in their particular district

or school, most teachers were "truly outstanding" professionals who deserved special recognition for what they already do. Thus career ladder plans should reward all deserving teachers for the services they presently render. Teachers also maintained that career ladder plans must preserve choice. Individuals should have the right to decide if they wanted to apply for career ladder money; they should be able to earn career ladder money in a variety of ways; and they should be able to define the projects and/or extra work requirements associated with career ladder plans. Finally, teachers contended that violation of these principles would jeopardize relationships among teachers and between teachers and administrators.

Teachers often translated these premises into concrete suggestions for how the career ladder plans could be set up. Typically, teachers supported maximum use of the extended contract option so that all teachers could receive additional money. Since the statute required that a portion of state funds be used for performance bonuses, teachers, albeit with some dissension, recommended the well-established seniority criterion as an initial eligibility screen. Teachers also recommended various point systems and ladder levels so that "all teachers could get something." Funds could be used for short term projects and activities that teachers wanted to take on or were already doing (ie, discipline programs, hall supervision, curriculum units, department chair positions, committee assignments, etc.). Money could be parceled out to all who applied in any one year, or dispersed to different individuals on a rotational system, a "turn-taking" basis.

Teachers used faculty meetings, association representatives, surveys, and informal conversations in schools to gauge responses to emergent plans and to "help teachers understand that they could write up what they were already doing." As one informants explained: " At first we had to calm people down. They thought proposals had to be like an essay, a massive kind of thing. So we went on a campaign to tell them that they could cut the proposals in half ... that they were already doing good things so they should use the money to pay for what they are already doing."

Modest Counter Pressures. During the initial planning phase, teacher preferences were not broadly or intensely challenged by other committee members, committee consultants, or state officials. Parents, administrators and consultants were, for the most part, sympathetic to teacher concerns and state education agency officials were willing to grant district committees the autonomy permitted in career ladder legislation.

Parents typically supported the teacher viewpoint and "strengthened the teacher position." Many of the parents were affiliated with the PTA or had experience as school volunteers. Some were teachers or former teachers. They were aware of teacher workloads; they agreed with teacher priorities; and, when in doubt, they were prone to defer to the expertise of the educators. In several settings where parents have a reputation for "being pretty headstrong," their energies were "sapped" by other more salient issues such as program cuts and proposed changes in school day schedules or attendance boundaries.

At times parents questioned the propriety of extended days. But the "sheer volume of teachers" on most committees, their unified stance on the issue, and the overriding need to "get some kind of plan in place" meant that the contest was pretty one-sided. As one teacher explained:

> We wanted those days more than anything. That gives all teachers a piece of the pie and it gives all of us what we need most ... time to get our work done. We fought hard for those days. We wouldn't give them up.

At times parents "pushed" for selective merit pay systems and "new, different things" but they were either "outvoted by the teachers" or accommodated through side-issue compromises that did not affect the distribution of funds. Their views on items unrelated to the use of career ladder funds (e.g., the number of school assemblies, programs and field trips) were usually honored. On occasion, their ideas became part of a menu of activities that teachers could chose to do to earn career ladder money and their input became one of several lines of evidence teachers could include in their evaluation portfolios. Parent influence was then, modest and intermittent.

Administrators tended to support teacher preferences for a number of different but complementary reasons. Personal convictions, political calculations, and "overloaded" schedules meant that administrators were willing, in most instances, to accept teacher recommendations.

Informants indicated that the "personal philosophy" of administrators prompted them to support teacher recommendations. Some superintendents believed that teachers had the right to shape the career ladder since they would be most directly affected by it. One superintendent told teachers, for instance, "It's your ladder. You create it." Some administrators agreed with the decision premises articulated by teachers. Teachers were not proposing any real change in authority relationships or accepted practices. As former teachers, administrators could identify with the concerns and accept the rationales teachers offered.

While personal convictions undoubtedly shaped administrative responses, political considerations were also very apparent. Many administrators anticipated that if teachers did not accept the program, they would end up "battling the unions" and "dealing with disruption." Both district and building administrators viewed the career ladder reform as a "pretty touchy," "really sticky," "potentially divisive" issue. The memory of "the raucous" teachers created at the state level was fresh in their minds. They did not want to be caught "fending off grievances and lawsuits." They were "willing to bend over backwards to accommodate union demands, work with teachers and stress that all teachers are wonderful." Select but representative comments illustrate:

> I did not want to divide teachers, have chasms develop over money.

> My concern was to keep all faculty and staff happy and have some good come of it by giving everybody a chance to get some money and support.

> Quite frankly, I didn't want any conflict ... when you try to be selective administrators get pitted against teachers and you get run through the wringer.

Many administrators recognized that the success of the career ladder program depended on teacher acceptance and cooperation. District administrators and principals explained:

> Every administrator has been a teacher and they know that you have to lock arms and move together. You can't set yourself up for conflict. You're dead if you do. You can't have a successful program if teachers are fighting it and you're fighting them. You can't move without them They need us too, but we need them more because they teach all those kids.

> I'm only as successful as my teachers. If they aren't working with me, it's all over.

Given competing demands and congested schedules, few administrators had developed a career ladder plan of their own. The career ladder reform was new for them too. As informants stated:

> Our superintendent didn't really have a plan in mind. We found that amazing, astonishing because he usually comes right up front, but he didn't really have any idea what to do. He said we could make it our program and his behavior matched his words. He helped us get tasks done, but he didn't impose goals or directions.

Others added, "they were struggling through like the rest of us. They didn't know what to do either. We were all stumbling through." Since most administrators were "scrambling" to simultaneously build defensible district budgets within tight revenue boundaries, attend to the logistical and technical aspects this new program, and manage a plethora of district issues, they were amenable to proposals that augmented rather than altered existing practice. Whether administrators assumed a fairly active role on the career ladder committee or simply "moved in and out" as others worked on the plans, whether they actually wrote the plans or delegated that task to teachers, they were, for the most part, willing to support teacher preferences in the initial planning process.

Administrators and teachers bargained and bartered some issues, such as the use of extended days, the selection of evaluation forms, the kinds of projects and committee assignments that career ladder funds could support. But their disagreements were marginal and minor. Differences were resolved through short-term adjustments that did not jeopardize the overarching commitment to broad distribution of benefits, support for existing programs, and reimbursement for the activities and services teachers were currently performing.

Several districts hired consultants to assist in the design of the career ladder plans. These individuals tended to affirm the decision premises set forth by teachers. They publicly stated that most teachers are competent and

capable; that career ladder plans should reward those deserving teachers for work they presently do. Consultants emphasized the desirability of continuous self assessment and pertinent supervisor feedback, rather than selective rewards. They focused on the development of evaluation systems that would enable teachers to demonstrate their worth to selection committees.

While the state education agency distributed guidelines (consisting primarily of verbatim reiterations of the legislation, procedural directions for the submission of plans, and requirements that proposed projects relate directly to the implementation of the state's core curriculum) and conferred with local district committees, this actor was willing to let local committees develop their own career ladder programs. Given the newness of the reform, imminent changes in the superintendent of public instruction position, the demands of other programs under their jurisdiction, and the tight time schedule, the state agency was, as one staff member expressed it, "flying by the seat of our pants." Another added, "we were trying to figure out what might work." Since the legislature had granted districts discretion, the state education agency "decided to let districts experiment and let good ideas bubble up." Staff provided technical assistance and "reminded us [planning committees] that the performance bonus part, the merit pay part was to be selective." But during the planning phase, the SEA was not inclined to "press" for any one model for designing career ladder programs and any one method of distributing career ladder funds.

Decision Outcomes. Career ladder plans reflected the decision premises and distribution criteria that teachers set forth. Plans emphasized extended contract days, a provision that enabled all teachers to receive compensation for work they would otherwise do in the evenings or on weekends. Most districts allocated the maximum amount of money permitted by the state statute to this component. The plans relied on teacher initiated applications, incorporated seniority-based screening criteria, provided multiple means through which teachers could qualify for the performance bonus or merit pay reward, and emphasized short-term, time-definite, special projects that could be parceled out to all who applied in any one year or rotated through the faculty over a two or three year period. These provisions ensured broad distribution of career ladder monies and placed control over the activities which would actually occur in the hands of teachers.

One district did adopt a career ladder plan that emphasized permanent promotional ranks. The planning committee in this district started developing a career ladder plan before the legislature enacted the reform. This district secured federal funds, hired a consultant, and settled on a promotional system comparable to that used in higher education. While this district's plan embraced the concept of permanent promotions, eligibility criteria stressed the familiar standards -- seniority, training, and service and incorporated multiple evaluation criteria. Nonetheless, a plan for permanent differentiation was approved in one instance. The dominant pattern, however, was to develop plans that preserved the principle of egalitarian distribution of salaries and teacher control of career ladder activities. As informants across settings summarized:

We had it set so that everybody could have a piece of the pie.

Our premise was that most everybody does a good job. That's the way we played it. Those who applied were sure to get money.

We made it so that everybody could get rewarded. Our main priority was equity. We are confident in virtually all teachers. We adopted the philosophy that all are outstanding, that all teachers that are good deserve a share of the kitty. We worked hard to develop a system where all could benefit equally.

We made it so that everybody could qualify.

We all decided that we'd rather make less by sharing the wealth. We'd feel better that way than if half the people made more and others got nothing so we put the plan together so it would work that way.

We made a conscious decision not to play the merit pay game. It's too disruptive. We'll say all our teachers are good and give everybody a chance to get a little more money.

During the initial planning phase, teacher preferences often prevailed because others had neither the inclination nor the opportunity to contest them. Teachers secured strong representation on planning committees; they initiated and reiterated decision premises and distribution criteria and promoted their preferences through persuasion and pressure. They appealed to the salient values of equity, quality, and choice and emphasized the disruptive consequences that significant deviation from those values would produce. Their extensive and unified involvement enabled them to set the parameters for the discussion of career ladder plans. Since the state education agency was willing to defer to local committees, and since those committees were composed of individuals generally sympathetic to teacher concerns and genuinely anxious to avoid the anticipated disruption and intensification of conflict that can occur when major changes in established practice are imposed, teachers had a receptive audience.

Furthermore, most career ladder plans were developed in extremely tight time frames. Districts could either formulate a plan or forfeit the funds. Time pressures were compounded because career ladder planning responsibilities came in addition to, not in lieu of educators' ongoing responsibilities. The state provided no funds for committee work. Few districts had discretionary monies to support release time for committee members. While some districts hired consultants and prepared "big binders of information," the opportunity to acquire, digest, and interpret information, let alone develop, discuss, and debate alternatives was limited. Given the need to hone compromises at the state level, statutory language was ambiguous and state education agency directives were largely procedural. Under these conditions, it is not surprising that career ladder plans absorbed the most immediate concerns of educators, reflected existing predispositions, and mirrored current work patterns. The tendency, given these circumstances, is to "side-step" the uncertainties inherent in major change; "satisfy the interests of important elements in the organization," and "expand existing modes of operation" (Williams and Elmore, 1976: 89, 91).

In this context, teachers, being fairly clear on their basic priorities and rather eager to have a say in the process, were able to set forth decision premises and distribution criteria, counter the modest challenges to those views, and define career ladder plans in ways that reflected their priorities. Whether teachers were simply convincing the already convinced or significantly altering viewpoints through salient symbols and subtle pressures, teachers shaped career ladder plans by directing attention to and providing the rationale for features that were consistent with their preferences. In arenas where participants share similar convictions and opportunity for deliberation is limited, as well as in arenas where contention is more probable, the actors who mold decision premises and justifications often become critical determiners of decision outcomes (Pfeffer, 1981:116). Teachers functioned in that capacity during the initial planning phase and thus became key actors in decisions regarding the distribution of career ladder benefits and the kinds of activities that would actually take place. Even in the one district where the notion of permanent differentiation among teachers was part of the plan, advancement criteria reflected teacher views and values.

Subsequent Attempts to Modify Career Ladder Plans

While a low key acceptance of teacher preferences characterized much of the planning dynamic, moves to alter and adjust the initial plans have been made. Pressure is being applied by parents, administrators, and state education agency officials. The pressure is aimed primarily at imposing greater discrimination, greater selectivity in the distribution of performance bonuses or merit pay stipends. Occasionally there is pressure for greater selectivity in the distribution of special project awards. Despite the incidence of pressure, teachers are able to counter these forces through a variety of strategies which allow them to maintain control over the distribution of career ladder benefits and the types of activities supported by career ladder monies.

Parental Pressures - Responses. In a few settings, parents reassert their desire to use special project funds for new activities, and move the career ladder toward a merit pay system. Again, the sheer volume of teachers on the committees, their unified position on these issues, and their willingness to respond to concerns not directly related to the distribution of career ladder funds operate to quiet and contain these pressures. In addition, teachers and administrators have shared information, developed what they term "PR campaigns" wherein they inform and publicize career ladder activities. As one described it: "At meetings we say, 'see this and see this and see this. We did that with the career ladder money.' That settles people down." While parents "raise their eyebrows" when particular applications are approved and occasionally "bring in their own plans" for career ladder committees to discuss, they are "pretty quiet about the career ladder."

Administrative Pressures - Responses. In several schools, principals, apart from any district directive, attempted to be somewhat selective in the distribution of performance bonuses and special project funds in their buildings. Principals typically saw the move as "some attempt at quality control." But teachers typically saw the move as: "a few principals took it upon themselves to play god." Though principals tried to minimize the

disruption that such action might precipitate by keeping the names of recipients secret, though teachers "were never supposed to admit if you got it ... we were to sort of tip toe around that ... somehow teachers found out" and quickly mobilized.

Teachers sanctioned the principals in several ways. Some confronted the principals directly. They "went to the office and raised cane." They "demanded that their evaluations be changed so they could get the money." Others threatened to file or filed grievances and used association channels to communicate complaints to the district office. They charged that rewards were arbitrary, that they were being "given out on a whim," because "a few were in good with the principal." As principals reported, "We got badgered from all sides."

Teachers also sanctioned the award recipients. Teachers who received merit stipends or project money said, for example: "We got raked over the coals." "We were torn to shreds. If you got rated well and got what teachers called the principal's award you either never went to the faculty lounge or you lied about the points and said you really didn't get an award." Other teachers also reported that award winners were "harassed," "shunned." They "took a lot of flack ... There was a great deal of pain."

The disruption teachers created prompted two types of responses. In some settings, the authority to disperse merit stipends and special project allowances was transferred from the principal to site-level committees composed of the principal, several teachers, and a parent representative. In other settings, principals stated that "now we just divide up the money between all who apply." Teachers also stated: "After teachers were at the office raising so much cane, the principal just sat us down and said this is what we have to work with. We're going to give all teachers money and keep them all happy."

In some cases, district administrators attempted to "grab ahold [sic]," to make the distribution of career ladder funds more selective, or as administrators put it, "more exclusive." One strategy was to set a limit on the number of projects and performance bonuses that could be issued at each school. Teachers typically responded by developing "turn-taking" systems. They made explicit "You apply this year and I'll apply next year" compacts with each other. The number of applications often coincided with the number of slots. Thus teachers informally controlled the distribution of funds.

A second strategy was to "put teachers on a point system" wherein money was distributed primarily on the basis of the points secured on administrative evaluations. Administrators tried to avert the disruptive impact of such a move by "keeping secret" the recipient names and reward amounts and by "withholding the evaluation scores." Individuals who asked about their own evaluations were told "the records are closed" or "go to the district office and find out." Even though teachers in these settings described themselves as "pretty powerless," "reluctant to ruffle the waters," "under the thumb of an administration that pretty much runs things," they "went into orbit." They were "disgusted" with the "catering" behaviors that developed as some teachers, at least in the eyes of their colleagues, "tried to get in good with

the principal." Teachers were "livid" when they discovered that files were closed. The local associations mobilized to secure open files, alter the point system so that all who get a particular score receive the same amount of money (a consequential concession since the "cut off" score is lower than that received by most teachers), and insert a "longevity clause" which gives stipends to all teachers based on years of experience (a salient win given the age of the teacher corp in these districts).

A third strategy was to "send back" the lists of those approved for merit pay stipends at the school level with explicit instructions that "you have to cut somebody, you can't give the money to everybody." Again teachers resisted. They had either experienced or heard about the repercussion of "discriminating among applicants" even in settings where selection committees had agreed to "be discrete," "keep their mouths shut" regarding the names of award recipients. Their information and instincts indicated that the rejection of "a few" was sufficient to disrupt school climates and make them "hotbeds." Teachers maintained:

> Word got out that some won and some lost...Only a couple didn't make it, but people were still reamed and ridiculed ... Sometimes it was in a joking manner, sometimes not. It caused a lot of strife.
>
> We denied a few applicants. Then we sat back and braced ourselves, but it was worse than we thought it would be. Some people didn't speak to me for the first half of the year. You'd come in to the lounge and they'd get up and walk out. There was a lot of pressure.
>
> After we rejected just a couple of people, we were accosted by faculty members in the hall, rest rooms, and faculty lounges. After all the flack we felt, it would have been better to distribute the money evenly to everybody. That's better than drawing the line.
>
> We only rejected one and things got really fierce. Teachers came to my door and made a scene. That's hard to take. It divides the school and hurts your standing with people in the school. It's too big a price to pay.

Principals concurred. They stated:

> We gave money to almost everybody. There was still disturbance. Teachers were trying to figure out who shot them out of the saddle. It was awful.
>
> Those who have applied received the money so we haven't had a problem. We're going to keep it that way. There are so many war stories about what happens to faculties when you discriminate. It's not worth it. I don't want to go through all that. Nobody else does either.

Little wonder, then, that teachers, often in concert with their principals, wrote letters to the districts, mobilized the association, threatened suits and pressured central office administrators until "the districts backed down." Virtually all those who applied for performance bonuses received them. The

social disruption was so pronounced that in several districts, teachers who had been on remediation one year were granted a merit award the next.

A fourth strategy was to state, from the outset, that career ladder monies would be selectively awarded. This strategy was apparent in the one district that instituted a permanent promotional ranking system. Yet here, too, the social disruption was so poignant that "few were denied" promotions the first year, and "with one exception, everybody that didn't make it last year got it this year."

State Education Agency Pressures. The most intense pressure for selectivity in the distribution of performance bonuses has come from the state education agency. Though the state office took a rather low profile position during the initial planning phase, this actor has become more assertive. Informants report that reflecting both the "legislative pressure for more merit pay" and "personal convictions," the state office has become "quite aggressive." Through state career ladder planning conferences, meetings with local district career ladder committees and informal conversations with district administrators, the state office has begun using its authority to approve plans and allocate funds as leverage for securing "greater discrimination" in the distribution of at least some career ladder monies. The formal written regulations have not changed, but the verbal interactions and staff advice illustrate the "push for greater selectivity," the insistence on "a kind of quota system." Informants across settings reported:

> The state came out and said that not everybody can get it [performance bonus] ... They said you're not saying one is better than another. You've got to rate them more ... It was a very clear directive.

> We had a state career ladder conference. The state office met with us. They [sic] were coming off pretty strong on the large number of people getting the performance bonus. The state people are saying we can't pay everybody off. That's not performance pay. They said they wouldn't approve our plans. That's a lot of pressure because you can't afford not to get the money ... They said we had to cut back to about fifty percent.

> The state office person came out to clarify state guidelines. [S/he] said we needed to make sure that the performance bonus was not given to all or to a huge percentage. We had the distinct impressions that ten percent of the funds for the performance bonus really meant that only ten percent of our teachers could receive the bonus. We were told that giving the bonus to more than ten percent of the teachers was abusing that part of the model ... If we didn't comply they [sic] said we'd lose our money.

> Last year we gave it [performance bonus] to everybody. The state department didn't like that. They came out and said that it could only go to twenty-five percent or so. They said that there is a real perception among legislators that not all teachers are good, that they don't mind paying for the good ones ... twenty to thirty percent are the good ones ... We were told to discriminate along those lines.

While the specific content of these accounts varies somewhat, the general theme is quite clear. Educators are to be more discriminating in the distribution of performance bonuses. Failure to do so may result in rejection of local plans and loss of categorical funds.

Informants consistently stated that the state pressure for changes in the distribution of performance bonuses has made teachers "upset," "angry," "ticked off." Several stated "bitter is the only word for it." The action is interpreted as a "back door" attempt to install merit pay, a "betrayal of the promise" to let local districts design their own programs. While not all teachers are satisfied with their local plans, (teachers do characterize them as "the hoop we have to jump through to get a little money") there is still a "sense of ownership." Many "invested a great deal of time and energy." Thus teachers have resisted state pressure in a number of ways.

In some settings applications are down. Teachers are individually and collectively "boycotting." Informants reported:

> Applications are down ... Our best teachers are not applying ... They'd rather bag it than go through the pain.
>
> Many have withdrawn their applications. The withdravals are our top teachers. There is so much pain. They'd rather not play the game.
>
> Very few have applied. The money is not worth what you have to go through. All that hoop jumping to prove you are qualified, and all that disruption if there is differentiation.
>
> The principals are soliciting applications because a lot of teachers are boycotting the performance bonus. I don't know how that will go. The more we try to align with state directives the more dissatisfied teachers get. They may well hold out and not apply here. We'll have to do something to get rid of those quotas.

It is too soon to determine whether this strategy will have any impact on state pressure to discriminate among performance award winners. What can be said, however, is that if teachers "hold" on the boycott, their "all of us or none of us" stance means that they once again control the distribution of benefits. It is difficult to distribute rewards if there are no applications for them. Teachers would be "giving up" funds, but they still have access to the special project monies and the extended contract days, the primary components of most career ladder plans, and they have ultimate control over whether the performance bonus portion is allocated.

While attempts to prompt change through boycott are evident in some schools, teachers recognize that such an approach is difficult to deploy because "some people are so strapped, they will do anything for a little extra money." Other strategies are emerging. In some instances, teachers are taking turns, rotating applications, "deciding among ourselves who should apply this year and who will wait until next year." A variation of the turn taking strategy is evident in settings where teachers are cooperating with administrators to "inflate" the applicant pool. Attempts to "get as many as

possible" to apply are underway; teachers informally agree to withdraw their applications altogether or "wait their turn;" those who have withdrawn are "kept as placeholders" so that all active applicants might receive awards. In other locales, teachers are making personal arrangements to "split the pot." As one administrator described it: "The given percentage of teachers in each category will apply. They plan to issue personal checks to everybody else in that category. How in the world do you police that?"

In several settings, teachers and administrators are mobilizing for more confrontive responses. They are "getting the documentation down," cataloguing responses to the existing career ladder plan, publicizing the benefits of career ladder projects and "networking" with parents and constituents so they are "in a better position to tell them to get off our backs." In the meantime, teachers and administrators are adjusting and revising their career ladder plans in ways that appear to reflect the "selectivity directives "but are not likely to alter the distribution patterns. Informants stated that they were "writing in cut-off standards below what most teachers were rated." That way, "you write what you need to write to get the plan approved ... you put the discrimination points in there," but distribution remains broad-based. Administrators and teachers across settings candidly stated:

> We wrote in what we needed to write in to get the plan passed by the state ... We put in the token steps and levels. We will do what we can get by with, what we can get away with.
>
> What it amounted to [getting the plan revised for approval] was ten very intelligent people working hard to circumvent the state.
>
> We had it so any teacher could achieve it. When the state said we had to revise it or they would not approve it, we put steps in to make it look like you would get more if you performed better.

It is important to note, here, that since statutory language and printed regulations relate only to the percentage of funds that must be directed to the performance bonus component, not the percentage of teachers that can receive a performance bonus award, these responses are not violations of the law. They are attempts to counter, through circumvention of verbal directives, the pressure to make the distribution of performance bonuses more selective.

Decision Outcomes. While the precise outcomes of these various strategies can not yet be determined (districts do not issue the performance bonuses until April), it is fairly clear that despite attempts to modify the original career ladder plans, teachers have been able to fundamentally control the distribution of career ladder funds and the activities supported by career ladder monies. Since the original career ladder plans were put into operation, there has been virtually no challenge to the extended contract component and only occasional challenge to the special project component. Selection committees have been willing to "send back" project proposals "for revision or greater specification," but informants across settings maintained that "few, if any, have ever been rejected." Thus broad distribution of funds to support work that teachers were already doing remains in tact.

The major contest is around the performance bonus. And in that domain, teachers have been able, through association action and social sanction, to deter, and when necessary, counter principal and district office attempts to make this component selective. The pressures applied to local administrators appear to have prompted a teacher-administrator alignment to minimize, circumvent or otherwise offset the state's push for selectivity.

Incremental Installation of New Work Arrangements

Initial Planning Dynamics

In two districts, the career ladder planning process took on a different dynamic, primarily because the superintendents, in these cases, anticipated the career ladder movement and developed a fairly clear definition of that reform.[5] While various versions of the superintendents' proposals were circulated in DRAFT: FOR DISCUSSION ONLY documents, the distinctive features included: (a) elimination of the traditional salary schedule; (b) installation of permanent, promotional positions for select teachers. The new teacher positions carried staff development, peer supervision, curriculum development and broad decision making responsibilities as well as regular but reduced classroom teaching obligations. Compensation schedules reflecting the responsibilities embedded in the new positions were proposed. Promoted teachers could earn up to $6000 more than nonpromoted teachers. Selection criteria deviated from the traditional years of service and levels of training indicators. Though these criteria could be considered in the selection of teachers for new positions, advancement was not dependent on seniority and training.

The superintendents promoted this plan through informal communications and formal task forces, composed of administrators and teachers from each school in their district. In these interactions, superintendents acknowledged that the proposed plan violated the long standing commitment to egalitarian salary systems but emphasized that other core values could be well served by these new arrangements. The superintendents persuasively and persistently directed dialogue to the overarching goal -- instructional improvement through ongoing opportunities for professional growth, continuous support to enhance the capacity of teachers to perform in classroom settings, and active involvement in the development of solutions to school wide problems. The

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[5] In one district, the superintendent organized a career ladder committee six months before the legislature enacted a career ladder statute. In the other district, a newly appointed superintendent organized a career ladder task force one year after the legislation was enacted. Although these districts operated on different calendars, the planning dynamics were very similar, in part because the superintendent in the first district became the superintendent of the second district. His close associate became his successor. These two individuals share comparable views of the career ladder reform and comparable views regarding the processes through which change can be encouraged and supported. They interact frequently and work cooperatively.

superintendents also consistently and repeatedly challenged teachers to "seize the initiative;" in order to avoid having "other people's ideas imposed" on the district. The superintendents warned that state appropriations would be tied to reform ventures; that state money "will not be added to the WPU [weighted pupil unit]; if we want more support, we'll have to change." And, they reminded both teachers and administrators that whatever reform initiatives the task forces or planning committees ultimately developed, those proposals would need to be substantively different than the status quo. Avoiding direct criticism of current practice and teacher performance, the superintendents reiterated that however effective the existing arrangements might have been in the past, however appealing those arrangements might still be, replications of the status quo "will not fly." Since the superintendents in each of these districts set forth a plan for reform, teachers were in a reactive position. Within the confines of this reactive posture, teachers mobilized to influence the reform.

Teacher Influence Strategies. The first strategy was to acquire stronger representation on the task force. The teachers associations demanded representation, arguing that individual teachers could not speak for all the teachers in the district. The certified support contingent (psychologists, special education teachers, counselors, media personnel) also insisted on representation. The president and/or president elect of the teachers association became a voting member of the task force, and an individual from the certified support contingent was appointed as well. Having bolstered their representation, teachers insisted that the salary schedule be retained. Informants explained:

> We fought for the salary schedule to protect against discrimination and capriciousness in salaries that teachers had to deal with for years. The uniform schedule eliminated some real abuses, including discrimination against women and vindictive principals, and there's no way we're going to give it up.

In effect, teachers presented an ultimatum: that portion of the plan had to be dropped or no further discussion of reform would take place. More moderate proposals (e.g., abandoning the salary schedule for newly hired teachers and grandfathering currently employed teachers) were introduced but beat back. Teachers, as one summarized, "made it clear that they would not accept this, even for new teachers only."

Teachers voiced, at times intensely and tenaciously, their strong commitment to fairness, meaning broad-distribution of economic benefits and their conviction that most teachers perform well and deserve support. Even though a sizeable number of promoted positions would become available (in one case, promotions for half the faculty), teachers resisted the selectivity. The words of one capture the dominant view:

> I would like to see more teachers involved ... There should be room for more than fifty percent of the teachers. More than fifty percent of our teachers are excellent.

Teachers translated these convictions into concrete suggestions for career ladder plans. Teachers supported optimum use of extended contract days for all teachers and recommended that promoted teachers be reimbursed for the additional time on the basis of their daily contract rate of pay. While the latter proposal meant that promoted teachers would receive different amounts of money for the same position, and while this recommendation created tension between newly hired and more experienced teachers, the association held fast to the preservation of the single salary schedule as the means for determining teacher compensation. The association would simply not permit any encroachment on that issue.

Finally, teachers argued that if individuals were to be promoted to new positions, teachers should be able to have a major role in the development of job descriptions and dominant representation on selection committees. The district could provide general guidelines, but the details and priorities should be developed by teachers at the school level.

External Pressures. While the superintendents and the teachers were the central actors in the planning dynamics, parents and the state education agency were also involved.

Parents typically supported the superintendents' initiatives. A concrete and substantive change was being discussed and debated. While parents argued that they too, should be involved in the selection of promoted teachers, this request was countered. Teachers argued that since parent information was second hand, student feedback was more appropriate. Superintendents aligned with teachers on that issue. Parents were persuaded to defer to the expertise of the professional and to accept the inclusion of student evaluations as a substitute for parental input.

As earlier noted, the state education agency did not assume an active role in the initial planning stage. Since plans had to be approved by the state office, they did need to comply with the statutory requirement that a percentage of funds be directed to a performance bonus component. This requirement put a "crimp" in the plans of the superintendents because they preferred to use funds to differentiate teacher salaries on the basis of new positions, new roles and responsibilities, not merit pay stipends. Moreover, given teacher pressures for egalitarian distribution of benefits, a merit pay scheme would be a "high risk" move.

Though parents were present and state requirements had to be satisfied, the fundamental features of the career ladder plans emerged as the superintendents kept pushing for permanent promotional positions as the vehicle for providing ongoing professional growth opportunities, improved capacity for classroom performance, and resources for school wide improvement and teachers kept pulling for a broad distribution of benefits, minimal differentiation among teachers, and control over the selection and duties of individuals assuming new positions.

Decision Outcomes. The decision outcomes reflect the compromises made as the superintendents and teachers negotiated the career ladder plan. First, the existing salary schedule would be retained for all teachers; promoted

teachers would be paid on the basis of their daily contract rate. A new system of advancement within teaching would be instituted, but it would be on top of, not in lieu, of existing salary arrangements. Second, the career ladder plan would make maximum use of extended contract days for all teachers. Third, any new positions would be short-term assignments. Teachers would "try out" the new arrangements on the condition that positions be reopened and/or rotated every year or two so that "everybody could have a chance." Fourth, since superintendents concurred that the school site was the most appropriate unit for a concentrated school improvement effort, specific plans would be developed at the site level. Teachers would retain their seats on the district task force and they would be strongly represented on site based committees formed to write job descriptions and select individuals for the new positions. Finally, the performance bonus would be available only to those who had not qualified for a promotional position. That way, more teachers could receive career ladder reimbursements. To avoid the anticipated disruption of merit pay, some schools warned committees, that "If you're going to turn down anyone, you had better be prepared to provide evidence against them." Most were not willing to assume the burden of proving that a colleague was unworthy. Thus, performance bonuses went to all who applied. At the close of the review process, "only a few" were denied merit pay stipends.

While these compromises significantly altered the superintendents' proposals, and while the superintendents were chastised by their supporters for "giving away the bank" and "cowtowing to the union," these accommodations were viewed as necessary in order to get a career ladder plan accepted by teachers and underway in the districts. Like the administrators in other districts, these superintendents realized that "teachers have to buy in ... they have to own it if it is going to work at all." Thus, they were willing to accede to the salient demands of teachers, accept major revisions, "soft-pedal" the performance bonus, and "take small steps" toward the goal of instituting new roles and stable advancement steps within the teaching profession.

Although teachers diminished the distinctive elements of the superintendents' proposals and delayed the installation of permanent promotional steps within teaching, their capacity to control the planning process was moderated by several factors. First, teachers were in a reactive posture. The superintendents had articulated a plan, a vision of "new action possibilities" (Kanter, 1983:279). Second, the superintendents' proposals challenged the longstanding commitment to egalitarian principles but coincided with other core values, notably instructional improvement through ongoing professional development opportunities and greater involvement in school wide decision making. Even though teachers are often suspicious of proposals that purport to give them greater responsibilities (Duke, 1984; Harris and Associates, 1986), the notion of empowering teachers through new work arrangements was considerably more appealing than the notion of regulating them through merit pay systems. There was, as teachers put it, "some sense," "some logic," to the proposals, "some reason to take the risks." There was also some excitement. Teachers were encouraged to be "pace setters;" to go beyond "tinkering," to move toward transforming existing arrangements. Thus

the proposals were potentially compelling.[6] Third, the superintendents had critical resources, notably time to consider unconventional options and acquire information regarding how these options might operate in specific schools; and money, local revenues to supplement state funds so that dollars were available for both the new positions and the compromises needed to get the new arrangements underway. Both superintendents were skilled in using these resources to simultaneously bargain and bolster, negotiate and nurture the innovation.

Subsequent Attempts to Modify Career Ladder Plans

Pressure to modify the original career ladder plan comes from the superintendents, administrators, teachers, and state education agency officials. Parents continue to serve on the career ladder committees, but they are not actively engaged in the decisionmaking process. Pressure to adjust the initial career ladder plan is aimed at two components, the promoted teacher provision and the performance bonus provision. The critical role that teachers play in these interactions is illustrated through an analysis of the dynamics surrounding each component.

New Positions. The superintendents have continued to be strong advocates of the original career ladder plans. They have attempted to modify them, however, by making promoted positions more permanent and by linking job descriptions to district curriculum goals and school site needs assessments. The superintendents have attempted to garner support by repeatedly articulating the relationship between the career ladder program and the core values of instructional improvement, professional growth, increased capacity to perform in the classroom setting, and broad decisionmaking responsibilities. They have offered training in clinical supervision, team leadership skills and power sharing concepts; surveyed teachers and administrators; supported independent assessments of career ladder programs; shared these data openly with task force members; and stated that the career ladder plans will be revised in light of emergent concerns as well as in terms of the original vision. In addition, the superintendents have tried to soften the deadly blow of tentative state funding by channeling local revenues to career ladder programs.

Teacher response to the career ladder program has been mixed. As a result, some teachers have aligned with the reform, others have actively resisted, and many have suspended judgment.

Teacher support for the reform resides in promoted and nonpromoted teachers who have experienced benefits from the new arrangements. Many promoted teachers reported meaningful professional growth as a result of the training they received in classroom observation techniques, inclusion in the inner circle of the school's information and decisionmaking network, the opportunity to train and counsel other teachers, and the chance to see first

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[6] With others, Huberman and Miles (1984) note that massive changes can be more compelling than minor adjustments; ambitious plans may survive better than more modest recommendations.

hand what was happening beyond as well as behind their classroom doors. Select but representative comments illustrate:

> For the first time in my life I feel like a real professional.
>
> I cannot over-emphasize the support I feel for career ladders. It has brought me real professional growth.
>
> I am not applying for the position for next year, but it really changed my perspective--to see the school and problems with more information and from different points of view. I will always see things differently now.
>
> It's the most exciting thing that has ever happened to me in teaching.

In most schools, nonpromoted teachers also reported that opportunities to work with skilled teacher leaders in the classroom or during inservice sessions "broadened horizons," fostered "mutual respect." Many praised the "greater awareness," "personal growth," "new skills," and "genuine support" they had acquired. Many stated they were more cognizant of their teaching and more confident in their classrooms. "We feel more positive about ourselves," "We give ourselves credit now for what we do well." "We're more gutsy, more sure of ourselves."

Some of the teachers who have had positive experiences with the career ladder program have become advocates of the new arrangements. They have begun to seek seats on the district and building career ladder committees, get more involved in planning and designing useful training programs and pertinent staff development activities, and convey their positive sentiments to other teachers. Their capacity to communicate their support and garner the support of others is augmented, in some schools, by principals who continuously articulate the purposes and goals of the program, publicize career ladder activities, share decisionmaking responsibilities, and "go out of their way to explain to the faculty that the teacher leaders are responsible, that they have discretion, that [the principal] doesn't overrule their decisions ..." Individuals within this group are pushing for more permanent promotional positions. As they state it, "A ladder's not a ladder if you fall off automatically every two years." Individuals are endorsing the concept of differentiated salaries, noting that promoted teachers "work their tails off" and "deserve even more money than they get." A few are beginning to push the superintendent as well as other administrators, to "move faster" and "go farther." From their vantage point, the career ladder is "not going far enough to empower and enable teachers." Apparently teachers, like other employees, can become "so stimulated by the enriched nature of their work that they seek even higher levels of responsibility and additional opportunities." (Hackman and Oldham, 1980:265). A cluster of teachers have aligned with the superintendent on behalf of the reform and within that cluster, invigorated allies hope to accelerate and expand the changes taking place.

Teacher resistance resides in both promoted and nonpromoted teachers, though it is most pronounced among the nonpromoted (Hart, forthcoming). These individuals would like to see the new positions eliminated or diminished. From their vantage point, the teachers settled for a career ladder plan that

or stable funding. As a result, "Why go through the hassle?" is a salient question and "This too shall pass," is a prominent comment.

While there are clear clusters of supporters and resisters, most teachers are ambivalent. Promoted teachers find their new roles stimulating, but their positive sentiments are tempered by the ambiguities and uncertainties inherent in new roles, the dissonance created when their new duties take time away from their classroom preparations, the difficulty of connecting the new positions and activities to both the immediate concerns of individual teachers and the broad goals of the school, and, most important, the weight of the intense social sanctions described above. Promoted and nonpromoted teachers alike are trying to balance the substantive benefits they have acquired with the social disruption they have experienced and the pervasive sense of overload which results as "a great many people invest a great deal of time and energy" in promoting and/or resisting change. Many are at least as exhausted by the pressures as they are enthused by the prospects of these new arrangements. Most teachers are torn.

The precise outcome of these dynamics is difficult, if not impossible to predict. While superintendents and their district staffs can continue to articulate purposes, provide technical assistance, and work to stabilize funds, while principals can moderate the impact of the reform in their buildings, the balance of power among those teachers who have caught the vision, experienced the benefits, and voiced support for the new arrangements, and those who distrust the policy, resent the differentiation, and constrain, largely through potent social sanction, the installation of new roles and relationships in schools will be a critical factor in determining whether a the new arrangements take hold. In some schools, the number of teachers endorsing the reform is growing. A "critical mass" appears to be forming. In other schools, the converse is occurring. In all instances, the fate is being decisively shaped by the teachers as they interact with one another and wrestle with the new arrangements in each school. Where promoted teachers have able to establish credibility with their colleagues, where they have been instrumental in ensuring that the new arrangements foster professional growth and instructional improvement, clusters of teachers have aligned on behalf of the reform. Only where groups of teachers endorse the reform, are there signs that the new arrangements are taking hold.

Performance Bonus. The dynamics surrounding the performance bonus in these districts are very similar to the dynamics surrounding this component in other districts. In an effort to avoid the anticipated disruption, division, grievance turmoil and legal challenges that can occur when merit pay is selectively awarded, teachers insisted and administrators often agreed that performance bonuses should be distributed to virtually all who apply. As is the case in other settings, the state education agency is pressuring these districts to make the performance bonus more discriminating.

These districts have resisted this pressure by emphasizing the salary differentiation that has been secured through the creation of promotional positions, the positive impact those arrangements have had on teaching, and the necessity of "leaving the performance bonus alone," so that more teachers can receive career ladder monies, so that some of the pressure for egalitarian

distribution can be accommodated without further diluting the distinctive features of the promoted positions. Again, teachers and administrators have aligned to buffer themselves from the regulatory pressures of the state to avert the disruption that they predict a selective distribution of bonuses would ignite.

Assessment of Teacher Influence on Local Implementation

During implementation, teachers mobilized to make the career ladder reform more congruent with their views and values. In all districts, teachers secured broad based distribution of career ladder funds through emphasis on extended contract days, agreements to distribute merit pay stipends to virtually all who applied, reliance on short-term projects that teachers could share by parceling funds to virtually all proposals or rotating projects through school faculties, and when necessary, the development of strategies to circumvent rules which required a more selective distribution of rewards. In two districts, salary differentiation was secured through the creation of new positions but only after extensive compromises that made the new arrangements temporary additions to, not permanent substitutes for existing structures. In all districts, career ladder funds were used to support conventional activities. In two districts, the career ladder reform also stimulated and supported new work arrangements.

Teachers exerted substantial influence in part through their associations, but more often, through their social and interpersonal interactions in school settings. Their numerical superiority and their strategic position as the primary service deliverers in a discretionary work setting constituted potent power resources. Teachers had the capacity to disrupt the work environment. It was both the anticipation of this troublesome consequence as well as the actual experience with intense social sanctions that prompted accommodation.

The patterns identified here, translation to conventional activity or uneven and incremental installation of new arrangements are not unique. Numerous studies of policy implementation in school settings (Berman and McLaughlin, 1978; Fullan, 1982; Farrar, et. al, 1982; Murphy, 1971) as well as research on efforts to institute new roles and reward structures in a variety of work environments vividly illustrate that "innovation 'wins' relatively infrequently. Instead the innovation is modified, sloved, or redefined in such a way as to be less of a problem for the surrounding systems" (Hackman and Oldham, 1980:249). More focused assessments of performance bonus and special project incentive plans reveal that merit pay stipends are often "quietly award[ed] ... to almost all teachers" (Murnane, 1985:5-6); and special projects tend to be broadly distributed to support work already underway (Waters, et. al, 1986; Tennessee Education, 1986:1). Attempts to selectively distribute economic rewards typically elicit intense social sanction and workplace disruption (Rosenholtz, forthcoming). Teachers develop mechanisms for coping with that disruption. One of the most common mechanisms involves reinterpretation and readjust of new policies so that they are more congruent with cherished norms and established practice.

Both building and district administrators are inclined to align with teachers in attempts to avert or ameliorate discord. While teachers depend on administrators for support to carry out their work, administrators are highly dependent on teachers. As the primary service deliverers in discretionary work settings, teachers have major responsibility for functions essential to the survival of the organization. There is, then, a strong tendency for administrators to anticipate and accommodate teacher sentiments; to "act as advocates of 'their' teachers ... to avoid formal, adversarial confrontations unless the circumstances are extreme" (Johnson, 1984:166). And, when "outsiders", in this case, state officials, attempt to gain control through regulatory means, the efforts usually precipitate "games of control and escape from control... [wherein] locals are always able to foil or transform ... distort or resist" the directives (Schon, 1981:59). The dynamics in Utah mirror the dynamics in other settings and suggest that teachers have the latitude, leverage, and linkages needed to significantly influence if not essentially determine policy outcomes.

Whether the adjustments made in implementation produce conventional activity or preserve some aspects of the innovative policy appears to be related to three factors: the clear and continuous articulation of "new action possibilities (Kanter, 1983:279), the ideational strength of the proposed change, and the availability of critical resources.[7]

While clear and continuous articulation of "new action possibilities" does not ensure that change will take place, articulation appears to be important. In districts where leaders, notably superintendents, set forth a concept, a vision of what a career ladder could be, some change did take place. Differentiation was minimized, but it was not smothered. Recent research on school improvement programs suggests that "when administrators were clear about what they wanted to accomplish and conveyed this sense of direction to the teachers and others," programs were more likely to take hold (Turnbull, 1985: 344; see also, Miles and Huberman, 1983; Fuhrman, Huddle, and Armstrong, 1986; Farrar, et. al., 1983).

While "the long-term success of an innovation requires more than merely the introduction of a good idea" (Davis and Odden, 1986), a good idea -- one that is compelling to those who must implement it -- helps (Huberman and Miles, 1984; Lawler, 1981). Where noticeable change occurred, superintendents selected an idea that held some promise of achieving the overarching goal of instructional improvement. To be sure, the superintendents' proposals challenged the engrained autonomy-equality-civility norms. The classroom would not longer be a private domain, teachers would not be equal in rank and stature, their interactions would go beyond friendly exchanges as they observed, critiqued and advised one another. Because the new arrangements would expose "how teachers teach, how they think about their teaching and how they plan for teaching to the scrutiny of their peers" (Little, 1985:34), the superintendents' proposals were threatening. Yet, the proposals could also provide opportunities for teachers to acquire knowledge, hone skills, share

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[7] These factors are more extensively treated in Malen and Hart, 1987, and Malen, Murphy, and Hart, forthcoming.

information, and shape school decisions. There was a basis for illustrating and emphasizing how the new arrangements might complement salient objectives even through they contradicted standard practice.

The availability and stability of resources conditions what organization and individuals in them can do. All local career ladder planning committees in Utah were bound by tight time frames, limited information, and strained revenue bases. But the two districts that managed to secure an incremental installation of innovative arrangements were in position to compensate somewhat for these liabilities. Superintendents anticipated the career ladder movement and began developing plans and gathering data early on. They supplemented state funds with local funds and federal grants. Thus they have been able to build in some "release time" for planning, training, and evaluation and they have been able to invest funds in the enabling provisions-extended contract days, short-term projects and special assignments--and still create a significant number of new positions for teachers. Funds provided bargaining currency. Superintendents could support both the new positions and the compromises needed to get the new arrangements underway.

SUMMARY AND DISCUSSION

Our analysis of career ladder adoption and implementation dynamics in Utah suggests that teachers exert substantial influence on the policymaking process. Often and accurately cast as central targets of influence, teachers are, in this case, important sources of influence as well. Operating primarily through their associations, teachers were able to constrain state activism. While they had little if any impact on reform inputs -- a career ladder statute was initiated, promoted and enacted despite their resistance -- teachers had considerable impact on policy outcomes. The concessions secured and sustained at the state level -- shift to local decision arenas, legitimate access to those arenas, and diffusion of goals through attachment of varied interests to reform legislation -- created a favorable opportunity structure for teachers to wield even greater influence during implementation. Operating through their associations, but more importantly, through their social and interpersonal interactions in the workplace, teachers constrained local implementation. They converted a reform seen as inconsistent with their interests into a reform more commensurate with their views and values. Their numerical strength, professional expertise, and position as the primary service deliverers were potent resources that enabled them to persuade, with appeals to salient principles, and pressure, with intense social sanctions. The latter strategy left little doubt that teachers had the capacity to disrupt the system, that others were highly dependent on their support and cooperation. Accommodations and compromises had to be made. In terms of shaping reform effects, the capacity of teachers to constrain directives at the state and local level is at least as important as other actors' capacity to initiate them.

Given the teachers' capacity to shape reform effects, our analysis suggests that ideational leadership holds more promise for instituting change than does regulatory control. Attempts to tighten career ladder regulations have been contained in the legislature and countered in the local arenas with a wide range of predictable and ingenious maneuvers that are virtually

impossible to monitor, let alone modify. Teacher responses to top down mandates for greater selectivity in the distribution of the performance bonuses vividly illustrate the futility of regulatory pressures, the inability of "reform by remote control" to fundamentally alter the views and values, the attitudes and actions of teachers (Cuban, 1984:215). Where change was taking place, leaders were relying on the continuous articulation of compelling ideas, collaborative revision, and constant adaptation. These strategies were not producing change in all schools, but, unlike the regulatory tactics, these approaches were facilitating the installation of new arrangements in some settings.

This analysis also highlights the need to refine our understanding of the conditions and contingencies that affect the fate of policies in school settings. The Utah experience suggests that ideational leadership and critical resources (time, information, funds for training and funds for trade-offs between enabling provisions and innovative elements of reforms) are necessary, but they are not sufficient. Change is taking hold in some schools but not others. While teachers are shaping the reform in all settings, their responses vary across sites. Studies which apply diverse theoretical perspectives to elaborate and explain the variance could generate useful insights regarding the factors which moderate teacher responses to and impact on the policymaking process.[8]

Finally, our research lends credence to the claim that the study of school politics and policies may be restricted by the "top heavy" perspectives typically applied (Schwille, et. al., 1980:26; Lipsky, 1978; Elmore, 1980). While systematic attempts to trace policies from state level to street level reveal how policy is adjusted, research that moves from street level to state level could illuminate how policy might be more effectively constructed. Through "backward mapping," actors may develop a clearer understanding of the problems to be addressed, the solutions to be applied, and the resource support that local districts and state governments need to provide to institute meaningful changes and desired improvements in school settings.

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[8] Scholars who concentrate on the impact of efforts to redesign work roles and reward structures consistently report that factors embedded in the specific work site shape activities and attitudes (Shaw, 1980; Griffin, 1983; Vance and Biddle, 1985; Adler, Skov and Salvemini, 1985).

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